

# Data Education Program

Instructor, Anne Legg, [anne@anneleggTHRIVE.com](mailto:anne@anneleggTHRIVE.com)



## Class #1: Credit Unions have more data than Amazon!

Data is the most robust asset a credit union holds. However, creating a pathway to leverage it to transform your credit union feels, well, overwhelming. This class will introduce the following key concepts needed to successfully leverage credit union data to improve members' lives.

- Current data assessment
- Enterprise data vision
- Member-centric use case
- Building data maturity
- Adopting data into the workplace

## Class #2: What to STOP/START/KEEP doing with data

Assessing the credit union's current data condition provides a critical foundation for setting a data transformation plan. An assessment will help identify the present condition to establish the organization's strengths (keep), obstacles (stop), and suggest a reasonable place to (start). This class provides a framework on how to holistically assess your credit union's current data condition

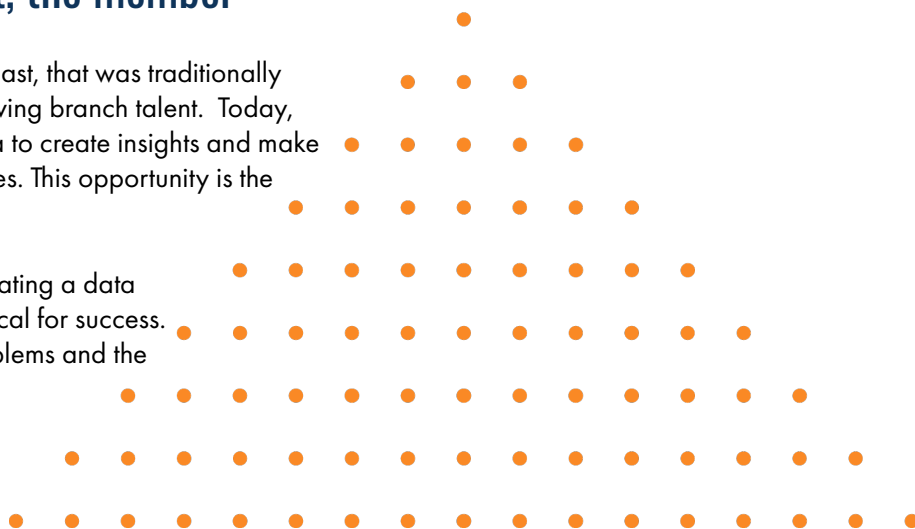
## Class #3: Data transformation is not only for data scientists

To accomplish any challenging project, there needs to be a plan. The same is true with credit union data. This plan is called your data strategy. A credit union data strategy articulates the credit union's member/business problems using data to solve. Simply put, a data strategy is a data "WHY." This class will define a credit union's data why (data strategy) and the framework needed to build and execute it.

## Class #4: Data is awesome, but first, the member

A credit union's mission is to serve its members. In the past, that was traditionally accomplished by personalized service delivered by loving branch talent. Today, credit unions have the opportunity to harness their data to create insights and make significant and impactful changes in their members' lives. This opportunity is the catalyst to change.

The member is the ultimate end-user of the data, so creating a data transformation plan that focuses on the end-user is critical for success. This class will drill into defining members' four key problems and the members' user experience ecosystem.



# Class #5: Who is more mature, your data or teenager?

Many credit unions feel that data maturity will organically occur. That is a fallacy. One of the most overlooked areas in data is enterprise maturity. This class will answer the question, “What the heck is data maturity, and what makes it mature?” In addition, this class will take a deep dive into the four common phases of data maturity, as well as the six phases of data governance.

# Class #6: Infusing Data into the Credit Union DNA

Connecting the heart (service) of a credit union to the head (data) will not develop organically. This class will explore what is involved in infusing data into your credit union culture. This class will introduce the problem-solving technique called design thinking, also known as human-centered design, and how it can be applied to infuse data into member resolution.

# Class #7: Continuous Capability Building

Workplace adoption is quite possibly the ultimate destination for data transformation. This class will define a Member Center of Excellence and how it can be utilized to support data transformation. Key concepts covered include:

- Internal support/readiness level
- Strategic vision and game plan
- Team skills and expertise
- Project charter & operational structure

## Text

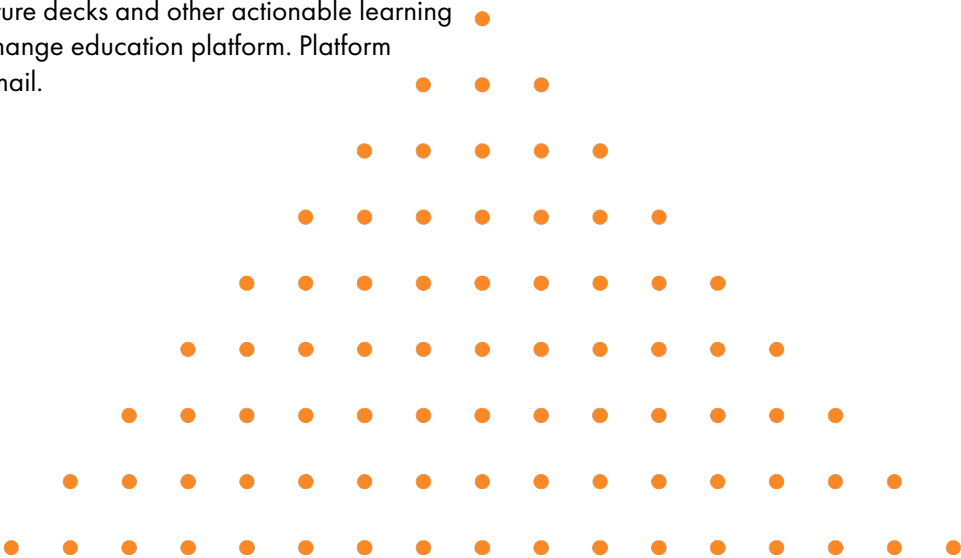
Big Data/Big Climb: A credit union playbook for leveraging data and talent to achieve revolutionary member relationships

## Instructor

Anne Legg, the founder of THRIVE, is an award-winning industry expert, author, educator, member-centric data strategist who holds an MBA thesis on the credit union business model. Her work has been published and presented at both the 2012 and 2014 International Cooperative Summit, making her the only Credit Union professional in the United States to do so. She has built both in-person and online curriculum for CUNA. Instructed at numerous CUNA endorsed schools and developed credit union professional certifications. All her education is created exclusively for the credit union industry leveraging her 17 years of credit union C-suite experience. She has guided over 600 credit union leaders in their data transformation journey.

# Online Knowledge Exchange Education Platform

Learning materials including class assignments, lecture decks and other actionable learning artifacts will be housed online in a knowledge exchange education platform. Platform access instructions will be sent in an introduction email.



Week	Date	Class/Action
Week 1	Monday, February 8, 2021	Instruction Video
Week 1	Tuesday, Feb. 9, 2021 9 am – 10 am	Class #1: Credit Unions have more data than Amazon!
Week 1	Tuesday, Feb. 9, 2021 1 pm – 2 pm	Class #2: What to STOP/START/KEEP doing with data
Week 1	Thursday, Feb. 11, 2021 9 am - 10 am	Class #3: Data is not only for data scientists  <b>Assignment: Complete data vision template</b>
Week 2	DUE: Feb. 19, 2021	<b>Assignment: Complete data strategy template &amp; internal assessment</b>
Week 3	Tuesday, Feb. 23, 2021 9 am – 10 am	Class #4: Data is awesome, but the member.  <b>Assignment: Complete MUX journey template</b>
Week 3	Tuesday, Feb. 23, 2021 9 am – 10 am	Class #4: Data is awesome, but the member.  <b>Assignment: Complete MUX journey template</b>
Week 3	Tuesday, Feb. 23, 2021 1 pm – 2 pm	Class #5: Who is more mature, your data or a teenager?  <b>Assignment: Complete data maturity &amp; data governance template</b>
Week 3	Thursday, Feb 25, 2021 9 am – 10 am	Class #6: Infusing data into credit union DNA  <b>Assignment: Complete data consumption template</b>
Week 3	Thursday, Feb 25, 2021 1 pm – 2 pm	Class #7: Continuous Capability Building  <b>Assignment: Complete workflow adoption template</b>